Phase III COD Communication Plan

Overview of Plan

The Communication Plan for Phase III of the Common Origination and Disbursement (COD) initiative encompasses distributing key messages to internal and external stakeholders about the progress, impact, and milestones of the COD system and process implementation. The Communication Plan is a counterpart to the External Outreach strategy for marketing and recruiting, but does not include External Outreach activities such as conducting school focus groups, sending COD pilot solicitation letters, or developing COD marketing materials. Key messages that overlap in the COD Communication and External Outreach Plans will be streamlined and distributed to the appropriate audience groups. These include information about available training, for example, and new customer service numbers and/or routing. (This is in addition to internal communications.)

Note: The COD Communication Plan is being submitted with the agreed understanding that it is an evolving document. This document is the Communication Plan for COD Phase III and is intended only to capture the communications scope from May 2001 to February 2002. Recommendations within this plan are based on the assumptions that key milestones will be completed on schedule. Should those completion dates move, training and communication dates will also be adjusted accordingly. As the COD solution development progresses, edits and additions will continue to be made to the planned communication events in order to incorporate new COD messages. These changes will be reflected in the COD project workplan.

Below is an outline of the communication strategy for COD:

I. The COD Steering Committee and Schools Channel Leadership will be informed of the COD communication strategy and communication schedule prior to the distribution of all **key** messages.

II. Communications will be distributed to the appropriate audience groups prior to or immediately following any major COD milestones so that both staff and external stakeholders will be prepared for the transition to the COD process and system. *Subject matter experts need to be leveraged during the development and crafting of key messages so that communications efforts are informed.*

III. The main strategy for distributing information internally, to SFA staff, is to deliver content to key audiences via SFANET and Schools Channel Leadership. The main strategy for distributing information externally, to the financial aid community, is to post content to IFAP and the Schools Portal, and to leverage COD presentations at key conferences and meetings.

IV. Feedback will be collected both formally and informally. Questions and concerns related to COD will be addressed through responses from Schools Channel Leadership and through communications produced by the COD Training and Outreach Team.

V. The plan assumes that collaboration will occur between the COD Training and Outreach Team, the Schools Channel Internal Communicators, and SFA Communications to the extent needed.

Purpose of the Phase III COD Communication Plan

The purpose of the COD Communication Plan is to build awareness and understanding of the Common Origination and Disbursement (COD) Solution within the Schools Channel and SFA, and among impacted external audiences. Through the delivery of timely and consistent messages, the plan is designed to meet the following objectives:

➢ Identify communication needs and issues of concern related to COD
➢ Ensure a clear understanding of the purpose and scope of COD
➢ Regularly communicate the status of COD
➢ Ensure understanding of the organizational impact of COD on Schools Channel employees
➢ Promote two-way, open and honest communication

These objectives will be met through timely delivery of information about COD, the collection of staff questions and concerns, and responses to feedback from leadership.

Guiding Principles

COD communications will be guided by the following principles and techniques in order to ensure ownership and achievement of the communication objectives:

➢ **Consistency** – The "look and feel" of communications must remain as standard as possible throughout the planning and implementation of COD. This will be accomplished through leveraging existing SFA communication vehicles and the use of standard templates. Key messages will be shared across the organization so that customer information is delivered with a "unified voice".
➢ **Appropriate Timing and Frequency** – Communications must be delivered when they are most important to targeted audiences. Selected subject matter experts will be integral to identifying audience needs within the Schools channel and helping to customize communications. Frequent message delivery will create trust and increase support and acceptance.

➢ **Honesty** – Messages must provide realistic expectations regarding planned system, process, and role changes. Questions and concerns must be addressed honestly and openly, and all audiences should be made aware of possible impacts and planned minimization strategies as soon as possible.

➢ **Two-way Communication** – Two-way communication must take place during the COD solution development and implementation. Staff will be provided with opportunities to give feedback to their direct managers, Schools Channel Leadership, and the COD Team both formally and informally.

➢ **Communication Effectiveness** – Voluntary feedback and communication surveys should be used to assess the success of COD communications. Gathering audience perceptions will reveal whether the communication objectives are being met and help determine continuous improvement strategies.

Audiences

The audience for the Phase III COD Communications Plan consists of internal and external stakeholders. The audience groups are as follows:

Internal to SFA
➢ Schools Channel
➢ SFA Staff at large

External to SFA
➢ Full Participants
➢ Phase-In Participants
➢ All Postsecondary Institutions
➢ Third Party Software Developers
➢ Third Party Servicers
➢ Postsecondary and Financial Aid Associations (i.e., NASFAA, One Dupont Circle)
➢ State Agencies and the FFEL Community
➢ Dept. of Education/Secretary, the SFA Advisory Committee, and the Direct Loan Coalition
➢ OPE
➢ Media

Proposed Communication Vehicles

Internal Stakeholders
➢ COD homepage on SFANET
➢ E-mails with links to SFANET
➢ Presentations and Q & As
➢ Letter from Kay or What's New in the Channel to be posted to SFANET (proposed)
➢ Quarterly All Hands or Schools Channel exhibitions, i.e., Spring Break (proposed)
➢ Schools 'N' Sessions Brown Bags (proposed)
➢ Schools Channel Senior Management meetings
➢ Schools Channel staff meetings
➢ InStep SFA newsletter articles

External to SFA
➢ SFA University Training Page
➢ IFAP/Schools Portal (Dear Colleague Letters, Electronic Announcements)
➢ SFA Community Announcements
➢ Targeted Financial Aid Conferences and Meetings
➢ Q & As and/or announcements on the Pell Grant, Direct Loan Origination, and SFA Tech Support websites

Review Process

The review process for COD communications should take *no more than two to four days.* Messages to be distributed to all Schools employees will be submitted to identified reviewers with a brief paragraph stating the main idea of the message, the intended audience for the message, the projected send date, and a deadline for returning comments. The flow of the review process for COD communications will occur as follows:
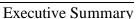
Level I Review: Mimi Yeh, Modernization Partner
                   * Identified Subject Matter Expert(s) according to content

Level II Review: Jane Holman, Schools Channel Training and Outreach Lead (Communications)
                   Jeannette Zink, Schools Channel Training and Outreach Lead (Training)
                   Mary Haldane, COD Team Lead

Level III Review: Kay Jacks, Schools Channel General Manager

Courtesy Review: Michaelyn Milidantri, Customer Service Call Center
                        Karen Freeman, SFA Communications
                        Lisa Cain, SFA Communications
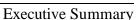
Communication Success Factors

The success of the communication program will depend on several factors:

- Commitment and support from Schools leadership
- SFA Human Resources involvement
- Program and geographic sensitivity in communications
- Usage of a variety of mediums to communicate messages
- Proactive two-way communication

Communication Risks and Mitigation Strategies

Because of the impact of COD on the processes and business units within the Schools Channel, it is critical to ensure messages reach all intended audience groups. Risks that could threaten the success of the communication program are listed below in addition to mitigation strategies to minimize those risks.

- **Heavy Reliance on Top-down Communication** - The intranet is becoming more widely used, but many employees still receive most news via meetings and/or conversations with their direct supervisors. This dependency constrains the information sharing possibilities and may lead to communication gaps. A method to minimize this reliance is to heavily populate the intranet with COD information and to train managers to refer their staff to the COD homepage. Support in the form of talking points or white papers should also be provided to managers so they have materials to both reference and distribute.

➢ **Employee Anxiety/Morale** - If communication is not proactive -- i.e. timely status messages delivered on a regular basis -- Schools Channel employees may feel isolated from the COD initiative and withhold information that would be useful during the COD solution development and transition phases. Ensuring that communication about COD is proactive and that internal staff understands the process and considerations involved in making key decisions can help prevent this anxiety.

➢ **Union Intervention vs. Union Collaboration** - Union intervention may occur if SFA Human Resources and Union representatives are not continually informed and involved in plans that impact Schools Channel employees. In the event that any role changes or expansion are required to support the COD solution, it is recommended that Schools Channel Leadership partner with SFA Human Resources in order to proactively address staff issues.

➢ **Unequal Communication to Internal and External Audiences** – It is important that equal amounts of information be distributed to internal and external audiences so that Schools Channel employees are informed when interacting with customers and other external groups. Considerations for the potential risk that unequal communication poses have been built into the communication plan. Overviews or copies of external messages are scheduled to be released internally first so that staff is adequately prepared when handling customer questions or attending conferences, etc.

➢ **Delays in the Review Process** - The review process is the key factor in delivering timely messages. If messages are not distributed when they are most important to the targeted audience, communication gaps are likely to widen. Delays can be minimized if reviewers are informed of their role and commit to the time needed to disseminate messages quickly. This time commitment should average no more than two to three hours per week.

Communication Quick Wins

The Schools Channel has already hosted a number of communication events to share information on the COD initiative, i.e., Spring Break, a walkthrough of the conceptual design with Title IV staff, etc. The following are recommendations or next steps for continuing to address the need for information on COD:

Internal Stakeholders
➢ Enhance the COD homepage to include up-to-date status on COD, Q & As, and a deliverables summary page.
➢ Identify and leverage subject matter experts that can help with the customization of communication messages.
➢ Partner with the Schools Channel Internal Communicators to publish monthly staff updates from Kay and to host Schools Channel All Hands meetings or exhibitions.

External Stakeholders
- ➢ Establish a point of contact for COD and the common record and include this information in all upcoming messages
- ➢ Develop a set of Q & As on the COD initiative and its impact to RFMS and DLOS and post this information to the Pell Grant and Direct Loan websites

Appendix A: Schedule of Communications

Following this Executive Summary is an appendix of the proposed schedule of communications, or communications calendar, that has been created in a table format. This communications calendar provides target dates when each audience group (internal and external) should receive communications based on the COD implementation schedule and workplan as of May 2001. It is expected that as the COD program evolves, the communications proposed in this calendar will also change. Additions, deletions, and adjustments will be made to the planned communication events in order to incorporate new COD messages. An up-to-date schedule of current and planned COD communication events will be maintained in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
Communications Delivered March 1999 through May 2001						
March '99 – Present	COD and Common Record Overview	• Postsecondary Institutions • Third Party Software Developers and Servicers • Postsecondary and Financial Aid Associations	• Presentations	• Kay Jacks • Mary Haldane • Katie Crowley	• Katie Crowley • Mary Haldane	Ongoing
1/5/01 – 1/31/01	COD Partner Selection Announcements	• COD Partners • Current Operating Partners • Management Council • SFA Managers of Current Contracts • Schools Channel • SFA • User Steering Committee • Postsecondary and Financial Aid Associations • Modernization Partner	• E-mail • Q & As • SFA Community Announcement	• Kay Jacks • SFA Communications	• Crystal Thomas • Mimi Yeh	Closed
2/15/01	COD Overview	• Customer Service Call Center	• Presentation	• Mary Haldane	• Mary Haldane	Closed
3/28/01	Schools Channel Spring Break	• SFA	• Presentation	• Mary Haldane	• Mary Haldane	Closed

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
4/13/01	Walk through of COD Conceptual Design	• Pell Staff • Direct Loan Staff	• Presentation	• Katie Crowley	• Katie Crowley	Closed
4/16/01 –4/18/01	• Ensure EAI/CPS/PEPS conversations are occurring • Verify various staffs receive communication	• COD Technical Architecture Team	• Meeting	• Crystal Thomas	• Crystal Thomas	Closed
4/20/01	• COD Update • How SFA plans to partner with Schools	• MASFAA Executive Board	• Meeting	• Kay Jacks	• Kay Jacks • Katie Crowley • Mary Haldane	???
4/21/01 – 4/23/01	• COD Update • How SFA plans to partner with Schools and Third Parties	• WASFAA Conference	• Presentation	• Kay Jacks	• Kay Jacks • Katie Crowley • Mary Haldane	???
4/23/01	• Overview of COD • Importance to FFEL • Common Record	• FFEL Community	• Round table discussion	• Kay Jacks	• External Outreach Team	???
4/29/01	• COD Update • Plans for partnering with schools and third parties	• NASFAA Executive Board	• Meeting	• Kay Jacks	• Kay Jacks • Katie Crowley • Mary Haldane	???
5/21/01	• COD Update • How SFA plans to partner with Schools and Third Parties	• EASFAA	• Presentation and focus groups	• Kitty Wooley	• Kitty Wooley	Closed

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
5/30/01 – 6/1/01	Schools Channel Information Sessions • Overview of Channel initiatives, including COD, Schools Portal, TIVWAN, etc. • Selection Criteria for Schools that want to participate in COD (Q & As?) • Request for feedback	• Select CAMS • Select Training Officers • Select IIS staff	• Information Sessions	• Jeannette Zink • Paul Hill • Mary Haldane • Kitty Wooley	• Paul Hill • Mary Haldane • Kitty Wooley	Closed
TBD	• Ensure EAI/e-CBS conversations are occurring • Verify various staffs receive communication	• COD Technical Architecture Team • e-CBS Team	• • Meeting	• Crystal Thomas	• Crystal Thomas	Closed
6/10/01 – 6/13/01	• COD Update • How SFA plans to partner with State Agencies	• NASSGAP	• Presentation	• Mary Haldane	• Mary Haldane	Closed
June						
TBD	• COD Update • Plans for partnering with schools and third parties	• One Dupont Circle	• Meeting	• Kay Jacks	• Kay Jacks • Katie Crowley • Mary Haldane	???
6/22/01 – 6/27/01	• Ensure EAI/FMS conversations are occurring • Verify various staffs receive communication	• Technical Architecture Team • Fund Accountability Team • FMS Team	• Meeting	• Crystal Thomas	• Crystal Thomas	Closed
6/25/01	• COD Update • How SFA plans to partner with Schools	• MSFAA	• Presentation	• Mary Haldane	• Mary Haldane	Closed

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
6/25/01	• Heads up on COD conference schedule • Send in your COD presentation dates	• CAMS • IIS staff • RTO staff	• E-mail	• Jeannette Zink • Kitty Wooley	• Kitty Wooley • Crystal Thomas	Open
6/27/01	▪ Overview of upcoming Outreach and Training	• Schools Channel Senior Managers	• Senior Managers' Meeting	• Jeannette Zink • Kitty Wooley • Jane Holman	• Kitty Wooley • Susan Thares • Jeannette Zink	Open
6/28/01	FYI COD Communication ▪ EAI and integration tool work ▪ COD Common record test data generated from DLOS and RFMS data	• Schools Channel • SFA	• E-mail	• Kay Jacks	• Paul Peck • Crystal Thomas	Open
TBD	FYI COD Communication ▪ EAI and integration tool work ▪ COD Common record test data generated from DLOS and RFMS data	• Postsecondary Institutions • Third Party Software Developers and Servicers • Postsecondary and Financial Aid Associations	• TBD	• Kay Jacks	• Harriet Downer • Kitty Wooley • Crystal Thomas • Paul Peck	Open
July						
TBD	• Would like to establish process and timeframe for submitting COD content to COD homepage • Would like to discuss possibility of feedback button added to COD homepage and linked COD mailbox	• Schools Channel SFANET content manager	• E-mail to be followed by brief meeting	• Crystal Thomas	• Crystal Thomas	Closed

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
TBD	• Would like to collaborate on communication initiatives for the Schools Channel	• Schools Channel Internal Communicators	• E-mail to be followed by regular meetings	• Crystal Thomas	• Crystal Thomas	Closed
TBD	• Would like to establish process and timeframe for submitting COD content (Dear Partner Letters and questions and answers to respective sites)	• IFAP content manager • Pell website content manager • Direct Loan website content manager • SFA Tech Support website content manager	• E-mail to be followed by brief meetings	• Crystal Thomas	• Crystal Thomas	Open
7/11/01	FYI: COD Communication • Overview of upcoming External Outreach and Training • COD Update and Q & As	• Schools Channel	• E-mail with link to COD Homepage	• Kay Jacks	• Kitty Wooley • Paul Hill • Crystal Thomas • Joy Shortlidge	Open
7/13/01	• Update on Channel Initiatives (NASFAA Draft Availability, etc.)	• SFA	• E-mail	• Kay Jacks	• Kitty Wooley • Paul Hill • Crystal Thomas • Joy Shortlidge	Open
7/18/01	▪ Heads Up on Training and Outreach (COD Information Packet and NASFAA Draft complete)	• Schools Channel Senior Managers	• Schools Channel Senior Managers' Meeting	• Jane Holman • Jeannette Zink	• Jane Holman • Jeannette Zink • Mary Haldane • Kitty Wooley	Open
7/18/01	FYI: COD Communication • Interim point of contact for COD; information to communicate to customers	• Schools Channel	• E-mail	• Kay Jacks	• Jane Holman • Crystal Thomas	Open
7/20/01	• COD Update	• NASFAA Executive Board	• Meeting	• Kay Jacks	• Kay Jacks • Katie Crowley • Mary Haldane	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
7/21/01 – 7/24/01	• COD Update • How SFA plans to partner with Schools	• AASCU Summer Council of Presidents	• Presentation	• External Outreach Team	• External Outreach Team	Open
7/22/01	• Overview of COD milestones • COD Information Packet Available • NASFAA Draft to be posted 7/30 • Explanation of Phase-In Program • Interim point of contact for COD	• Postsecondary Institutions • Third Party Software Developers and Servicers • Postsecondary and Financial Aid Associations	• NASFAA Conference (Opening session and COD session) • SFA booth	• SFA	• Kay Jacks • Mary Haldane • Kitty Wooley • Harriet Downer	Open
7/28/01 – 7/31/01	• COD Update • How SFA plans to partner with Schools • Impacts to the business process	• NACUBO	• Presentation	• Kay Jacks	• Kitty Wooley • Harriet Downer • Crystal Thomas	Open
7/30/01	FYI Communication: • Update on Channel Initiatives • See COD Homepage for COD Information Packet and recent presentations • Explanation of Phase-In Program and COD selection criteria • NASFAA Draft available now (includes common record and COD edits) • Q & As	• Schools Channel • SFA	• E-mail with link to COD Homepage	• Kay Jacks	• Mary Haldane • Jeannette Zink • Jane Holman • Kitty Wooley • Crystal Thomas • Joy Shortlidge	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
7/30/01	• NASFAA Draft Available	• Postsecondary Institutions • Third Party Software Developers and Servicers • Postsecondary Financial Aid Associations	• IFAP/Schools Portal • SFA Download	• SFA	• Kitty Wooley • Harriet Downer • Crystal Thomas	Open
TBD	• Verify various staffs receive communication about final decisions on reconciliation, p-note processing, establish funding, and interfaces	• Title IV Staff (CAMS, etc.) • CFO • CPS • CBS • CIO • DLSS	• TBD	• Kay Jacks	• Kay Jacks • Mary Haldane • Paul Hill	Open
TBD	• COD Update • External Outreach plan for selection of COD Phase-In Institutions • Implementation Schedule	• Postsecondary and Financial Aid Associations (i.e., NASFAA, One Dupont Circle) • Direct Loan Coalition	• Meeting	• Kay Jacks	• Kay Jacks • Katie Crowley • Mary Haldane	Open
TBD – 9/1/01	• Ensure EAI/NLSDS conversations are occurring • Verify various staffs receive communication	• Technical Architecture Team	• Meeting	• Crystal Thomas	• Crystal Thomas	Open
TBD – 10/1/01	• Ensure EAI/DLSS conversations are occurring • Verify various staffs receive communication	• Technical Architecture Team	• Meeting	• Crystal Thomas	• Crystal Thomas	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
TBD	• High Level strategy for transitioning the organization to COD	• Schools Channel Senior Managers	• Meeting	• Kay Jacks • Jane Holman • Jeannette Zink	• Kay Jacks • Jane Holman • Jeannette Zink • Mary Haldane • Mimi Yeh	Open
August						
8/1/01	• Heads Up on Train ing and Outreach Activities • Update on upcoming training schedule and training content • Heads Up when COD Test Environment will be available for SFA • Overview of Testing Plan • Overview of Testing Schedule	• Schools Channel Senior Managers	• Senior Manager Meeting	• Jeannette Zink • Jane Holman	• Jeannette Zink • Mimi Yeh • Joy Shortlidge • Jane Holman	Open
8/6/01	• Heads Up that Common Record Test Environment will be available for Third Parties • Overview of Testing Plan • Overview of Testing Schedule	• Title IV Managers	• Meeting	• Jane Holman	• Jane Holman • COD Technical Architecture Team • Paul Hill • Kitty Wooley	Open
8/8/01	FYI Communication: • Common Record Test Environment availability date • See COD Homepage for NASFAA and upcoming Software Developers' Conference presentations	• Schools Channel	• E-mail with link to COD Homepage	• Kay Jacks	• Jane Holman • Paul Hill • Kitty Wooley • Crystal Thomas	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
8/8/01	• Schools Channel All Hands on August 22nd • Highlight of topics	• Schools Channel • SFA	• SFANET • Posters	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
8/9/01	• Heads Up that Common Record test environment will be available for Third Parties • Overview of Testing Plan • Overview of Testing Schedule	• Third Parties	• Third Party Software Developers Conference	• SFA	• Kitty Wooley • Harriet Downer	Open
8/15/01	• Heads Up that Common Record test environment will be available for Third Parties • Overview of Testing Plan • Overview of Testing Schedule	• Postsecondary Institutions	• IFAP/Schools Portal	• SFA	• Kitty Wooley • Harriet Downer	Open
8/22/01	• Schools Channel All Hands	• Schools Channel	• All Hands Meeting/ Videoconference (proposed vehicle)	• Kay Jacks • Jeannette Zink • Jane Holman • Victoria Edwards • Clarence Hicks	• Kay Jacks • Jeannette Zink • Jane Holman • Victoria Edwards • Clarence Hicks	Open
TBD	• Invitation to be a COD Trainer • Details on Train the Trainer Sessions, Role and Time Commitment	• CAMS • RTOS	• E-mail	• Jeannette Zink • SFA University	• Jeannette Zink • bSusan Thares • Joy Shortlidge • Crystal Thomas	Open
September						
9/5/01	• Overview of COD Security Plan • Overview of COD	• Schools Channel Senior Managers	• Meeting	• Jane Holman • Jeannette Zink	• Jane Holman • Jeannette Zink • Joy Shortlidge	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
	Training Schedule, Content, and Pre-requesites					
9/10/01	• Heads Up that COD Security Plan will be issued soon	• Title IV Managers	• Title IV Managers Meeting	• Jane Holman	• Jane Holman • COD Technical Architecture Team	Open
9/10/01	FYI COD Communication • COD Training Schedule • Overview of COD Training Content • COD Prerequisites, if applicable	• Identified COD Trainers	• E-mail	• Jeannette Zink	• Joy Shortlidge	Open
TBD	FYI COD Communication • COD Security Plan is finalized	• Title IV Managers • CIO	• Title IV Managers Meeting	• Jane Holman	• Jane Holman • COD Technical Architecture Team	Open
9/17/01	Communication Questionnaire should be distributed to assess the effectiveness of the COD communication program	• Schools Channel	• Questionnaire	• TBD	• Jeannette Zink • Crystal Thomas • Mimi Yeh	Open
9/17/01	• FYI: Common Record Test Environment Available • Testing Plan and Schedule	• Phase-In Institutions • Phase-In Third Parties	• E-mail	• Kay Jacks	• Crystal Thomas • Katie Crowley	Open
9/18/01	• FYI: Common Record Test Environment Available	• Postsecondary Institutions • Third Party Software Developers/Servicers • Postsecondary and Financial Aid Associations	• IFAP/Schools Portal	• SFA	• Crystal Thomas	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
9/25/01	• Channel Initiatives (i.e., Common Record is being tested; see COD Homepage for Testing Plan and Schedule) • Recount All Hands	• Schools Channel • SFA	• E-mail with link or Letter from Kay on SFANET (proposed vehicle)	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
TBD	FYI COD Communication • List of Initial COD Schools for 02-03 published	• SFA	• E-mail and/or meetings	• Kay Jacks	• Mary Haldane • Sue O'Flaherty • Crystal Thomas	Open
9/25/01	Common Record being tested	• Postsecondary and Financial Aid Associations	• Letter	• SFA	• Mary Haldane • Sue O'Flaherty • Jim Zimmerman	Open
9/25/01	Common Record being tested	• Postsecondary Institutions • Third Party Software Developers and Servicers • State Grant Agencies(?)	• IFAP/Schools Portal	• SFA	• Mary Haldane • Sue O'Flaherty • Jim Zimmerman	Open
October						
10/1/01	• COD Training Schedule • Overview of COD Training Content • COD Prerequisites, if applicable	• COD Phase-In Institutions	• IFAP/Schools Portal • Letter	• SFA	• Joy Shortlidge • Crystal Thomas • Mary Haldane • Sue O'Flaherty	Open
10/1/01	Heads Up on COD Presentation to be given at Texas Fall Conference	• Dallas Regional Staff • Customer Service Call Center	• E-mail	• TBD	• Crystal Thomas • Sue O'Flaherty	Open
10/1/01	Heads Up on COD Presentation to be given at New York Fall Conference	• New York Regional Staff • Customer Service Call	• E-mail	• TBD	• Crystal Thomas • Sue O'Flaherty	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
	•	Center				
10/03/01	FYI: COD Communications • See COD Homepage for presentations to be distributed at MASFAA	• Schools Channel • SFA	• E-mail with link to COD Homepage	• Kay Jacks	• Crystal Thomas	Open
10/7/01 – 10/10/01	• COD Update	• MASFAA	• Presentation	• External Outreach Team	• Kay Jacks • Mary Haldane • Kitty Wooley • Harriet Downer	Open
10/8/01	• See COD Homepage for updated Q & As and presentations delivered in October	• Schools Channel • SFA	• E-mail with link to COD Homepage	• Kay Jacks	• Mary Haldane • Jeannette Zink • Jane Holman • Kitty Wooley • Crystal Thomas • Joy Shortlidge	Open
10/8/01	• Present communication survey results	• Schools Channel General Manager	• Meeting	• Jane Holman	• Crystal Thomas	Open
10/10/01 – 10/12/01	• COD Update	• Texas Association of Financial Aid Administrators	• Presentation	• Mary Haldane	• Kay Jacks • Mary Haldane • Kitty Wooley • Harriet Downer	Open
10/14/01 – 10/17/01	• COD Update	• RMASFAA	• Presentation	• Kay Jacks	• Kay Jacks • Mary Haldane • Kitty Wooley • Harriet Downer	Open
10/16/01 – 10/19/01	• COD Update	• New York Fall Conference	• Presentation	• External Outreach Team	• Kay Jacks • Mary Haldane • Kitty Wooley • Harriet Downer	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
10/23/01	• Channel Initiatives • Upcoming All Hands • Upcoming COD Training	• Schools Channel • SFA	• Letter from Kay on SFANET (proposed vehicle)	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
10/29/01	• Updated COD Q & As • See COD Homepage for presentations to be given at upcoming Electronic Access Conferences	• Schools Channel • SFA	• E-mail with link to COD Homepage	• Jeannette Zink or Mary Haldane	• Mary Haldane • Jeannette Zink • Jane Holman • Kitty Wooley • Crystal Thomas • Joy Shortlidge	Open
November						
11//01/01	• Schools Channel All Hands on November 14th • Highlight of topics	• Schools Channel	• SFANET • Posters	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
11/5/01 – 11/7/01	• COD Update • COD Training	• Electronic Access Conference Attendees	• Presentations and Training	• External Outreach Team • Identified Trainers	• Mary Haldane • Jeannette Zink • Jane Holman • Kitty Wooley • Harriet Downer • Crystal Thomas • Joy Shortlidge	Open
11/14/01	• Schools Channel All Hands	• Schools Channel	• All Hands Meeting/ Videoconference (proposed vehicle)	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
11/28/01 – 11/30/01	• COD Update • COD Training Update	• Electronic Access Conference Attendees	• Presentations	• External Outreach Team • Identified Trainers	• Mary Haldane • Jeannette Zink • Jane Holman • Kitty Wooley • Harriet Downer • Crystal Thomas • Joy Shortlidge	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
December						
12/3/01	• Heads Up on COD Presentation to be given at CCCSFAA and CASFAA	• San Francisco Regional Staff • Customer Service Call Center	• E-mail	• TBD	• Crystal Thomas • Sue O'Flaherty	Open
12/11/01 – 12/13/01	• COD Update • COD Training	• Electronic Access Conference Attendees	• Presentations and Training	• External Outreach Team • Identified Trainers	• Mary Haldane • Jeannette Zink • Jane Holman • Kitty Wooley • Harriet Downer • Crystal Thomas • Joy Shortlidge	Open
12/14/01 – 12/16/01	COD Update	• CCCSFAA	• Presentation	• External Outreach Team	• Kitty Wooley • Harriet Downer • Crystal Thomas	Open
12/16/01 – 12/18/01	COD Update	• CASFAA	• Presentation	• External Outreach Team	• Kitty Wooley • Harriet Downer • Crystal Thomas	Open
12/17/01	• Highlight of Channel Initiatives	• Schools Channel • SFA	• Letter from Kay on SFANET (proposed vehicle)	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
TBD	• Training and/or Deployment Communications TBD	• TBD	• TBD	• TBD	• TBD	Open
January						
1/14/01	Communication Questionnaire should be distributed to assess the effectiveness of the COD communication program	• Schools Channel	• Questionnaire	• COD Change Champions	• Jeannette Zink • Crystal Thomas • Mimi Yeh	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.

Phase III Proposed Communication Calendar

Date	Message	Audience	Vehicle	Sender	Content Developer	Status
1/21/01	• Highlight of Channel Initiatives • Upcoming All Hands on February 27th *(proposed)*	• Schools Channel • SFA	• Letter from Kay on SFANET (proposed vehicle)	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
1/28/01	• Present communication survey results	• Schools Channel General Manager	• Meeting	• Jeannette Zink	• Crystal Thomas	Open
TBD	• Deployment Communications TBD	• TBD	• TBD	• TBD	• TBD	Open
February 2002						
2/4/02	• Schools Channel All Hands on February 24th • Highlight of topics	• Schools Channel • SFA	• SFANET • Posters	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
2/19/02	• Channel Initiatives • Upcoming All Hands on February 24th	• Schools Channel • SFA	• Letter from Kay on SFANET (proposed vehicle	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
2/25/02	• COD System processes a Direct Loan and Pell Record at the same time	• External Community • Media	• SFA Community Announcement (Press Release)	• SFA Communications	• Karen Freeman • Crystal Thomas	Open
2/27/02	Schools Channel All Hands • Recognition and Contribution	• Schools Channel	• Meeting/ Videoconference (proposed vehicle)	• Schools Channel Internal Communicators	• Schools Channel Internal Communicators	Open
TBD	• Deployment Communications TBD	• TBD	• TBD	• TBD	• TBD	Open

* Additional communication events will be determined as needed. An up-to-date schedule of current and planned COD communication events can be found in the COD project workplan.